



**This form is to be completed by the financial adviser who has provided a financial plan to an insured or dependant where a claim has been submitted and paid for death or terminal illness.**

Please complete, sign and date the form and forward together with a copy of an invoice for services to [adviserdetails@axa.com.au](mailto:adviserdetails@axa.com.au).

A financial plan benefit can only be paid where it is included in one of the following products:

- AXA/AC&L Life Insurance Plan
- AXA Risk Protection Package Life Protection Plan
- AXA Risk Protection Package Superannuation Life Protection Plan
- AXA Risk Protection Package Trauma Deluxe Plan
- AC&L Living Security Program Recovery Protection Plan
- AC&L Living Security Program Life Protection Plan
- AC&L Living Security Program Life Protection Superannuation Plan

**Adviser details**

<input type="text"/>					<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Adviser name										Adviser number	
<input type="text"/>			<input type="text"/>			<input type="text"/>					
Phone number			Fax number			State					

**Client details (where a financial plan has been provided)**

Mr  Mrs  Miss  Ms  Other please specify

<input type="text"/>					<input type="text"/>					
Surname (please print)					Given name(s)					
<input type="text"/>										

Plan number(s) where a claim has been admitted and the financial plan benefit is being applied.

**Adviser declaration**

I have provided a financial plan for the above mentioned client and understand that a benefit may be paid in accordance with the financial plan benefit terms and conditions as stated in the plan document of the plan under which a death or terminal illness benefit was admitted. I understand that where this benefit is available under more than one plan, the benefit will be payable once only per claim event.

<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature of facilitating adviser			Date